CHAPTER 1
Overview, Basics and Logging into the System

What you will learn from this Chapter:

- **What is RMS?**
- **What makes it different?**
- **How RMS Works**
- **Commonly Asked Questions**
- **Logging Into The System**
- **Menu Bar Options**

CHAPTER 1: Overview, Basics and Logging Into The System

What is RMS?

The Resident Management System (RMS) is a quality management and contract administration system designed by Resident Engineers to help their staff do their job. The system provides an efficient method to plan, accomplish and control contract management by integrating job specific requirements, corporate technical knowledge, and management policies.

The emphasis of RMS is to allow front-line field personnel to concentrate on their primary functions, such as on-site quality assurance, customer care, preparation of modifications, safety enforcement, etc., while taking care of routine administration.

Many of the reports produced by RMS such as pay estimates, quantity variations and modification documents, are the actual forms or documents required and used during daily operations. In addition, wide ranges of management reports have been specifically designed to help field personnel evaluate contract status and identity appropriate actions.

The power of RMS comes not only from its ability to help the staff do their job, but also in its ability to provide Resident Engineers and Project Managers with an objective overview of contract and program status. RMS achieves this through its

- **Comprehensive Job-specific Planning**

  In RMS, you create a unique sound plan for each contract encompassing lessons learned from previous jobs, preventing problems and providing a means for objective measurement.

- **Practical Implementation Tools**

  The right set of tools helps the staffs do a better job and be more productive. Because the computer helps in performing the work, it also records it and automatically keeps much of the plan alive and up-to-date.

- **Control and Evaluation Mechanisms**

  These provide the ability to recognize and prevent problems, modify the plan, or take corrective action.

What makes it different?

Five key features differentiate RMS from other software programs written for the field office.

1. **Target Audience –** The target audience for RMS is the Resident Engineer and their staff, rather than upper management. The advantages of the broader, lower level audience is that key information goes directly to its end user, productivity gains are multiplied and the accuracy of data is improved.

2. **Level of Integration –** The typically stand-alone modules, such as pay estimates, deficiency log and the modification status log are integrated and share information with each other. In addition, planning and scheduling are integrated into the same system. RMS exchanges data with other Corps of Engineers systems, such as CEFMS, PROMIS and SPS.

3. **Evaluation of data –** RMS doesn't just sort and report data, the program evaluates it. The pending modifications report is a good example. Rather than duplicating the construction manager's report, this report compares the status of each pending modification to the resident office policies. If RMS finds any discrepancies it reports them to you with the pending action(s) and the standard office procedure for that particular situation.
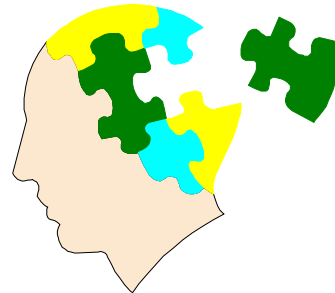
4. **System dictionaries –** System dictionaries are available for all contracts. They contain information such as repetitive deficiencies, safety checks, construction inspection checks, etc. RMS uses these dictionaries to tailor the three-phase inspection checklists and ensure the accuracy of data entered into the computer. There are three different levels of libraries within RMS:

   - **Local Libraries**
     These libraries are composed and maintained by the local field office to represent the unique management styles and needs of the on-site manager and staff.

   - **District Libraries**
     The libraries managed by the District are designed to provide uniformity of key data throughout all the field offices within the District. The data entered at the District level typically would change less often than the data from a local library.

   - **System Libraries**
     Libraries considered as "system libraries" are maintained by the RMS Center to provide data and format required by the RMS program and will provide uniformity throughout the entire Corps of Engineers. This data is typically mandated by HQUSACE by specific policies and/or are driven due to program interfaces with other of the Corps financial management systems, such as CEFMS, PROMIS, PDD and so forth. In addition, the MASTER CHECKS are maintained by the RMS Center and are gleaned from experiences and problems found in many of our field offices.

5. **Resident policies –** Since all Resident Engineers do not share a common management style, RMS allows each resident office to define their own policies while retaining full power and flexibility of the program.

How RMS Works

All the modules in RMS work together, though you don't have to use them all and nothing you do in one section can harm your records elsewhere. Consider RMS as a tool to help you do your work more efficiently and consistently.

The idea is to make RMS your contracts control center…to keep everything you are likely to ever need in one place, working in unison as a single force. So you don't have to learn a dozen different programs or to enter the same information several times. Let's take a brief look at the **CONTRACT** menu. We will cover each module in greater detail in later chapters of this manual.
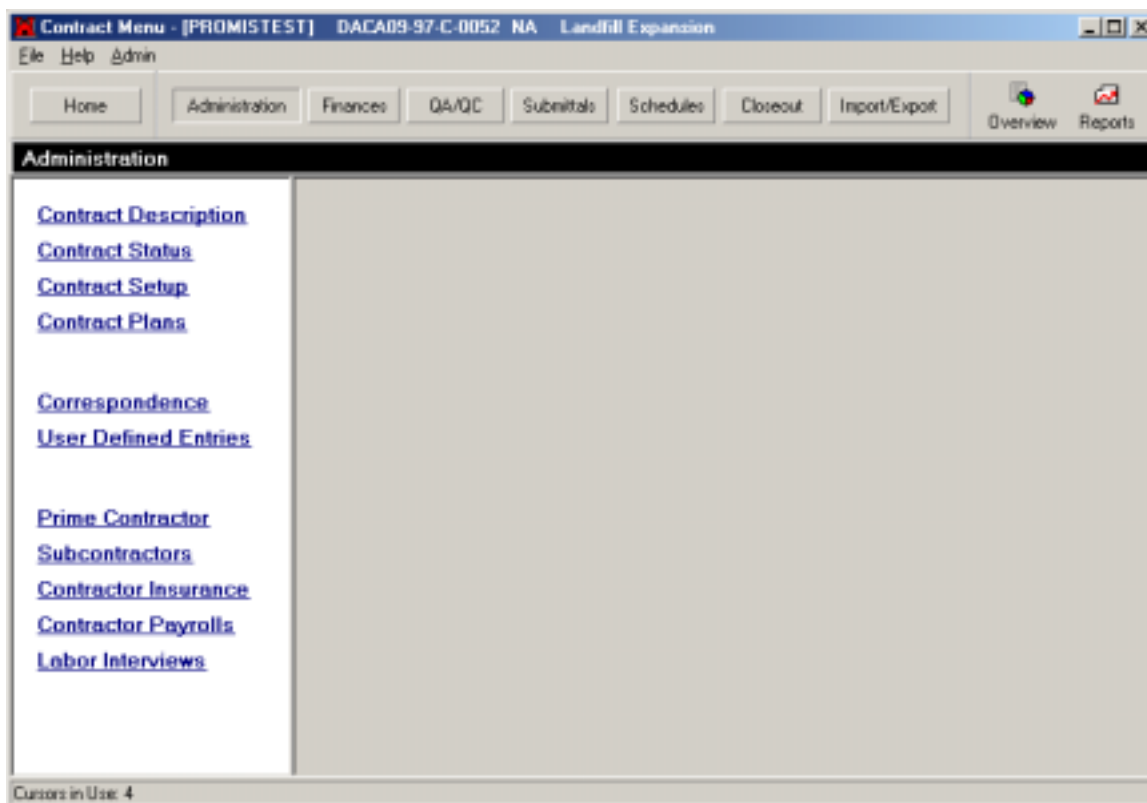
- **Administration -** This area presents what we need for the normal administrative functions of a typical contract. It is where we will enter the descriptive data and status for the contract and setup the various areas for the contract to utilize RMS in a more meaningful way for the particular contract or Customer. Letters pertaining to the contract will be here under **Correspondence**. Tracking data for **Prime Contractor**, **Subcontractors, Insurance, Payrolls and Labor Standard Interviews** will be found here also.

- **Finances -** Anything to do with MONEY will be found with this selection. It is the place where CEFMS data is exchanged and we "load" our **Construction**

Working Estimate (CWE) for management purposes. **Contractor Activities, Modifications** and **Progress Payments** are made from this selection.

- **QA/QC –** Whether you are using RMS or a paper napkin to manage contracts, pre-job planning cannot be overlooked. There are just some tasks that the Resident Office must tackle; Quality Assurance and Quality Control are two of the more important ones. RMS simply makes it orderly and consistent. Tracking and reporting tools are found here, as are the tools for setting up the three-phase inspection checklists and planned Labor Standard Interviews. Contractor control and reporting tasks are also included with this selection. The daily Quality Assurance Report (QAR), the Quality Control Report (QCR) and QC requirements are accessed through this selection. The Safety Manual (EM 385-1-1) will be linked to this selection.

- **Submittals -** Submittal Logs and Transmittal Logs are located here. The ENG Form 4288 and ENG Form 4025 are populated from the data entered. Submittal Reviewers are entered from this area, as is the formal transfer of the submittals to the Customer at the conclusion of the contract.

- **Schedules –** Anything to do with DATES will be found in this section. Dates included here include the **Feature Schedule, Baseline Schedule, Activity Schedule, Milestone Schedule** and the **Monthly Placement Schedule.**

- **Closeout –** Closeout activities can consume a significant amount of resources and, if not managed carefully, will be put off until the least opportune time…at the end of the job, when you are really too busy to worry about items that have already taken place. This module is updated throughout the life of the contract and will produce almost effortlessly the DD Forms 1354, 1149, and 2626. This section is a major time saver. After the contract is completed you will be making periodic Warranty Inspections. This is the place to record the results and actions of the Warranty Inspections.

- **Import/Export –** Importing data from a variety of sources is another key feature of RMS. Whether you need to import from another RMS program, from the Contractor version of RMS, a Contractor scheduling package (SDEF) or the submittal register, it is all done from this selection. RMS will also export to other programs, such as another RMS program, PROMIS and PD².

Commonly Asked Questions

You probably have some questions by now, so we've included answers to some of the most frequently asked questions.

"How much input is required?"

An averaged sized contract, i.e. under $10 million, can be loaded in just a couple of days. Most of the initial information consists of the items submitted by the contractor, such as the pay schedule, submittal register, and QC plan. When the contractor is using the Contractor version of RMS, this is imported with just a few keystrokes. Prior to award of the contract, your PM will be tracking the project in PROMIS. This will be downloaded directly into RMS at Award and then RMS will begin updating the PM module. The financial data from CEFMS can be imported and you then set up the Award Construction Working Estimate (Award CWE) for contract management. Our AEs and Designers have been mandated to be use **SpecsIntact** for our submittal register and this also directly imports into RMS.

Information required to maintain current contract status is obtained while doing regular daily business such as logging incoming/outgoing correspondence, tracking submittal reviews, processing change requests and modifications, recording construction deficiencies, etc. You can expect that it will only take from ten to fifteen minutes per contract each day to enter this data. The assigned Quality Assurance Representative will use RMS for their Daily QA Report.

"What additional information do I need to collect to run RMS?"

The short answer is *"None!"* As indicated above, the information required by RMS is the same information that you are now gathering to manage your contract. However, with RMS, you capture the information once and the system continues to reward your efforts throughout the life of the contract.

"How long does it take to learn the system?"

The RMS program is completely menu driven so you can turn on the computer and get started as soon as it's installed. If you are currently performing contract administrative duties, or making Daily Quality Assurance Reports, you won't have trouble navigating the program. By the time you have loaded one job, or done a few reports, you should be familiar and confident with the system.

"Why should I change the way I do business?"

Again, the short answer is *"You don't!"* Using RMS is much like using a calculator instead of pencil and paper. You should find it faster and more accurate, and an enhancement to your normal way of doing business. We have tried very hard to include and provide for as many management styles and functions being used today throughout the Corps of Engineers. If you see something that you believe will enhance the program or accommodate how you are doing business, please contact the RMS Support Center with your ideas.

"What are the advantages of using RMS?"

In most instances, the knowledge of a contract is divided between the Resident Engineer, Field Representatives, Office Engineer, Reports Clerk, Secretary, or others.

Even if information is shared extensively, no one individual will know everything about a contract.

For example, consider the effort required for a Field Representative to be prepared to attend a preparatory inspection. At a minimum, they should know the work activities involved, any previously noted deficiencies, the subcontractors doing the work, the status of their insurance, appropriate Davis-Bacon wages, the status of all required submittals, planned QC and QA testing, installed property, Government furnished and salvaged property to be transferred, repetitive deficiencies from prior contracts and appropriate field inspection and safety checks to be made.

By linking knowledge from previous contracts with completely integrated contract requirements and adding the speed of the computer, this time consuming job can be accomplished in minutes.

This example can as easily apply to the status of change orders, or locating all the known information involved regarding a claim. With RMS, the advantages are increased speed and accuracy, while reducing workload and effort. In short, you get a better job with less effort.

The Answer is RMS

In this time of constrained resources and competing priorities, Corps of Engineers field personnel must continue to provide our customers with the highest quality facilities possible. Success depends on a consistent proactive management emphasis and our ability to leverage all resources available to the Resident staff. We must be efficient in what we do, prevent problems before they occur, and hold the contractor responsible for his work. This is what RMS does and why it is so successful.
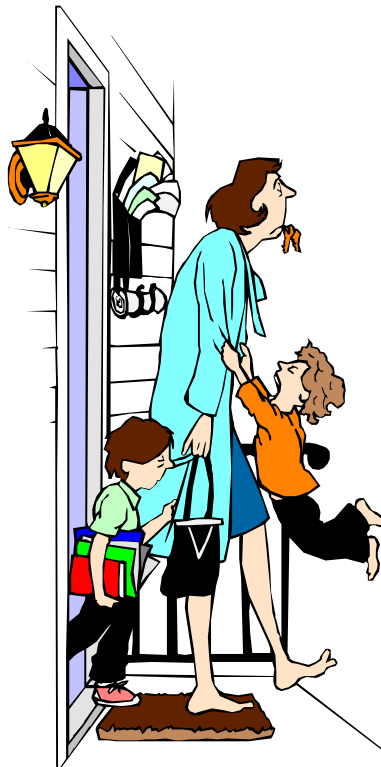
BEFORE RMS   AFTER RMS

Logging Into the System

CEFMS is a large, diverse system encompassing virtually every functional area of the U.S. Army Corps of Engineers' organization. It handles much more than the finances having to do with our construction contracts. Like CEFMS, RMS is controlled through use of USERIDS and passwords and application access permissions. Without these items, a user will be unable to enter the system to initiate and process documents or to download financial data needed for RMS.

NOTICE
ALL VISITORS MUST GET PASS AT OFFICE

RMS for Windows is designed to be User friendly. It provides a comprehensive system, yet is flexible enough to be adapted to local preferences and policies. Before accessing RMS for Windows you must login.

Click the RMS **Castle** Icon on the Desktop to begin using the RMS program.

RMS Windows.lnk

After the Login button is pressed, the system verifies the User with the RMS security system and the Oracle Database. This Login User ID and Password must be a valid User ID with the Oracle Database and a valid User ID and Password for RMS.

RMS Login Window

Enter Your RMS/Oracle User ID and Password

Login User ID   L1C0HFBF

Password   ▪▪▪▪▪▪▪

? Help   Login   Cancel

NEVER! NEVER! NEVER! Use "password" as your password. Also, do not use your first name, last name or your EROC ID as your password.

You must also LOGOUT of RMS correctly and completely!

LOG OUT OF RMS CORRECTLY!!! The CORRECT WAY is to use the top of the Menu, click on FILE and EXIT. DO NOT just click on the "X" in the upper right hand corner. If you do not exit correctly your profile may get corrupted and you will not be able to login next time through the CEAP Centers.

The "idle out time" on the WPC Terminal server is set at 8 hours. (This is the amount of time the servers allow you to keep RMS open without doing anything in it, such as having it in the background while working in a different application.) However, if you are leaving for the day or for an extended period of time, you should make it a habit to log out. The reasons for not leaving a connection open for extended periods of time when not using it include things like:

1. **Resource utilization on the servers.**
2. **Taking up bandwidth on your link (not a major issue when idle, but for field offices that have a slow link, like modem or ISDN, too many of these could have an impact).**
3. **Security, applications should not be left running unattended unless you have some kind of security in place, like a password protected screen saver. – See your local security policies.**

Using Citrix for RMS Access?

To change your password in Citrix, perform the following:

1. Open Citrix Program Neighborhood
2. Highlight the RMS Icon
3. Find and Click on **Properties** – if you can't find this, in some systems you will need to go to **File**, then **Properties**
4. Click the tab on top named **Login Information**
5. Erase the asterisks in the password box and enter your new password

Auto Contract Feature

RMS for Windows automatically reconnects you to the last contract this User ID selected. If you wish to select another contract use the ***Contracts Explorer*** that is the first window you see after logging in.

New User

A valid User must add a new User into RMS. New Users are created in the ***RMS Office Staff and User Control.*** The assigned Office Administrator will typically accomplish this task.

U-PASS Administrators

Refer to Appendix A for U-PASS information relative to setting up your RMS databases to be administered through U-PASS.

Menu Bar Options

Home Module

RMS is organized into six primary modules as shown below. When you select an option on the screen, a listing down the left side of the main window will reflect the available options for that particular module. For example, selecting "Home" will show all the offices in the District on the left and all contracts associated with a selected office on the right side of the screen.

The first selection, **HOME**, presents the contracts control center and will include everything to do with the particular contract you have selected. This selection is available throughout the program and will return you to this screen when used.
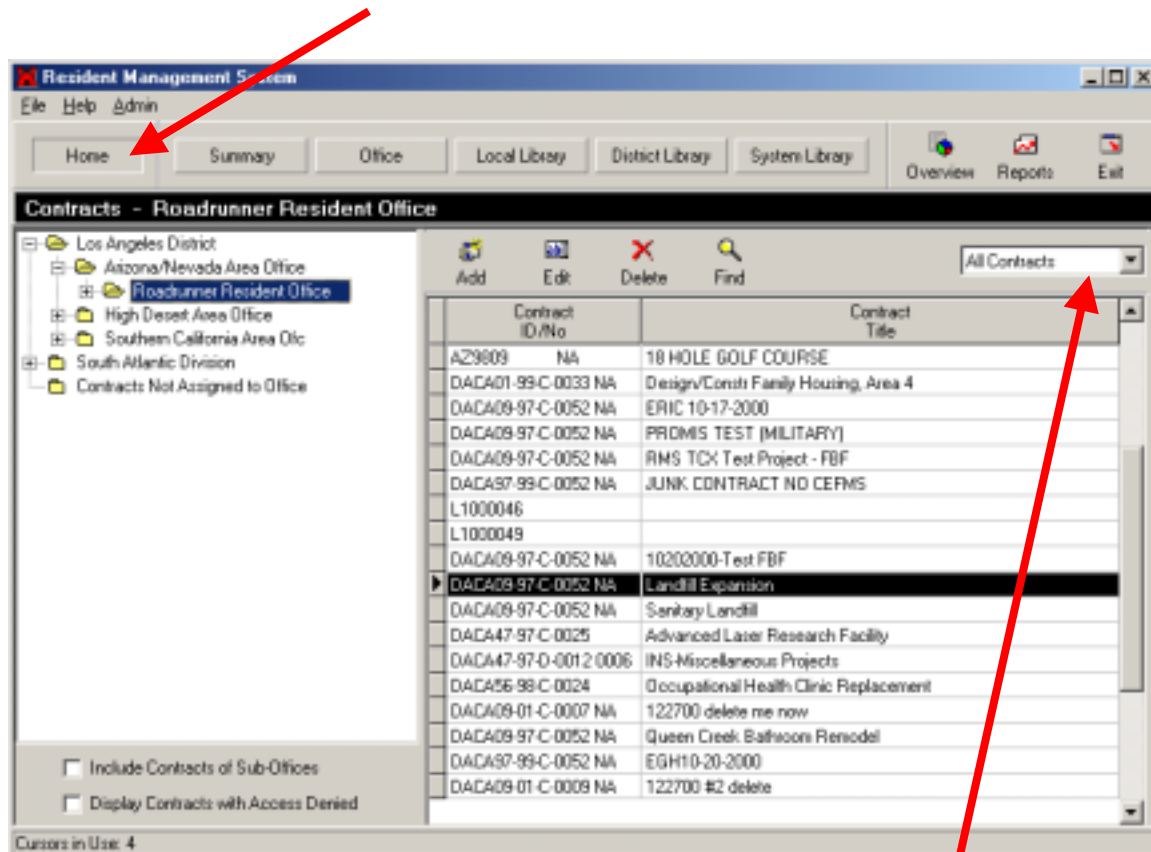
You have the option of displaying all the contracts in an office or selected (active, future, completed contracts) contracts for the individual office, as well as any **Sub-Offices** that may be applicable.

As you are required to log into RMS using your assigned name and password, you will be able to distinguish between the contracts you have access to and those that you have been denied access to by checking the **Display Contracts with Access Denied** block at the lower left of the window.

Summary Module
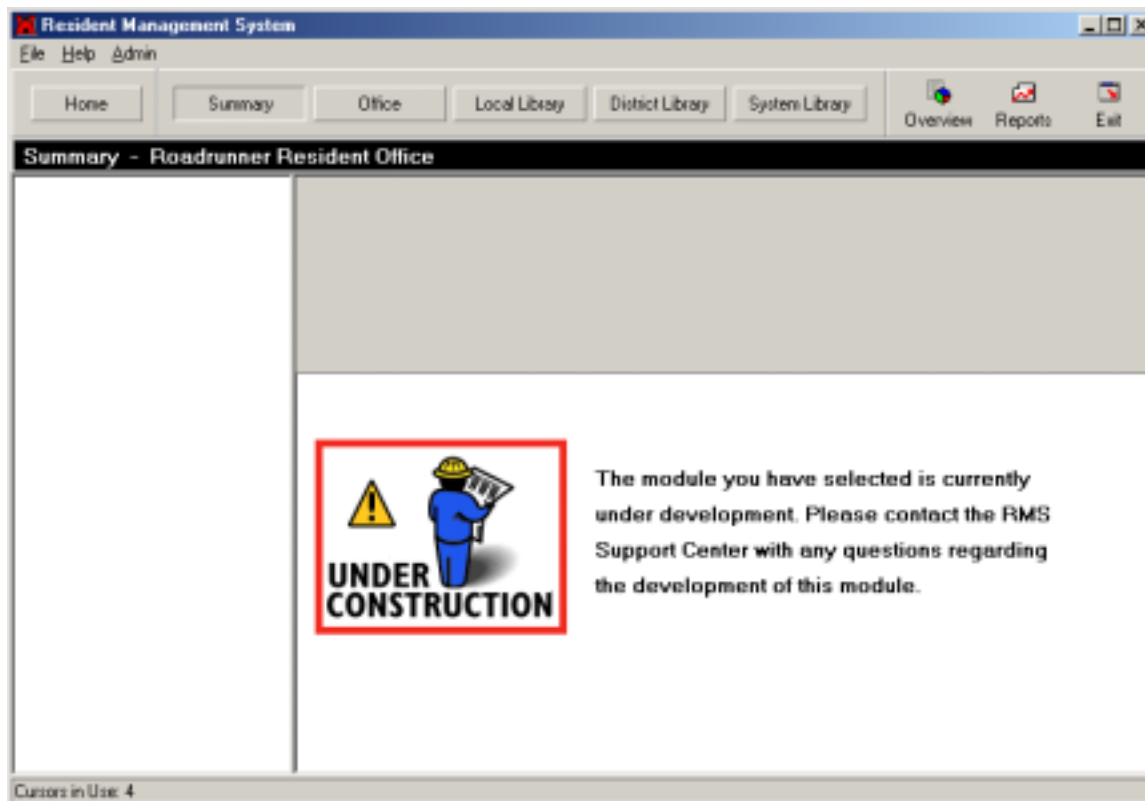
This module in under construction and will eventually provide summary views and selections that will span across multiple offices and contracts.
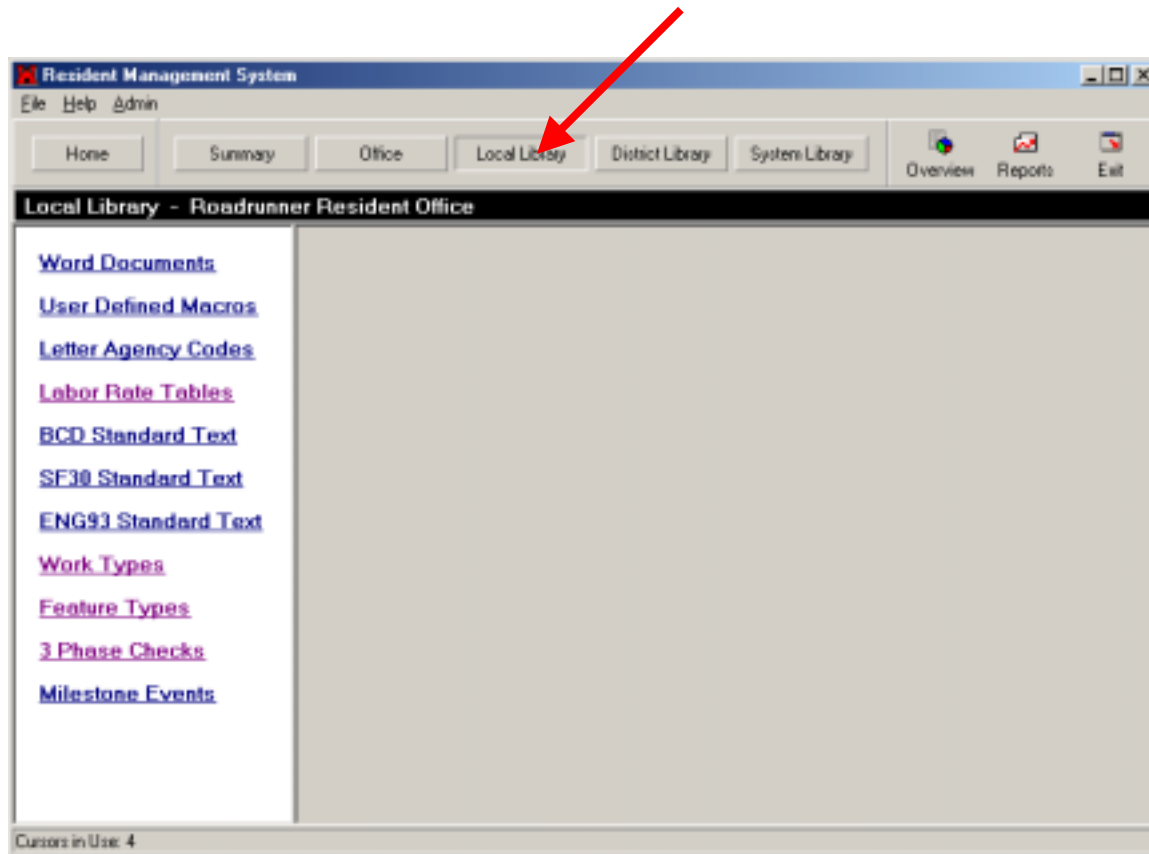
Office Module

The second module, **OFFICE**, tracks data pertaining to the offices and staff that will interface with RMS for all contracts. The staffing will include all local users and other support staff, such as the Contracting Officer, submittal reviewers from other offices, etc. This is also where individuals are given access and permissions to work in various areas of RMS and is where you assign staff members' access to particular contracts or portions of contracts. **Access Control** will be discussed in Chapter 2 of this User Manual.

Office policies that will apply to all contracts and actions for a particular office will be found here. Also, you will complete special macros under "**User Defined Entries**" that can be used in locally prepared plans, form letters, modification documents, etc. These macros are created in the **Local Library**, which will be discussed in a later chapter.
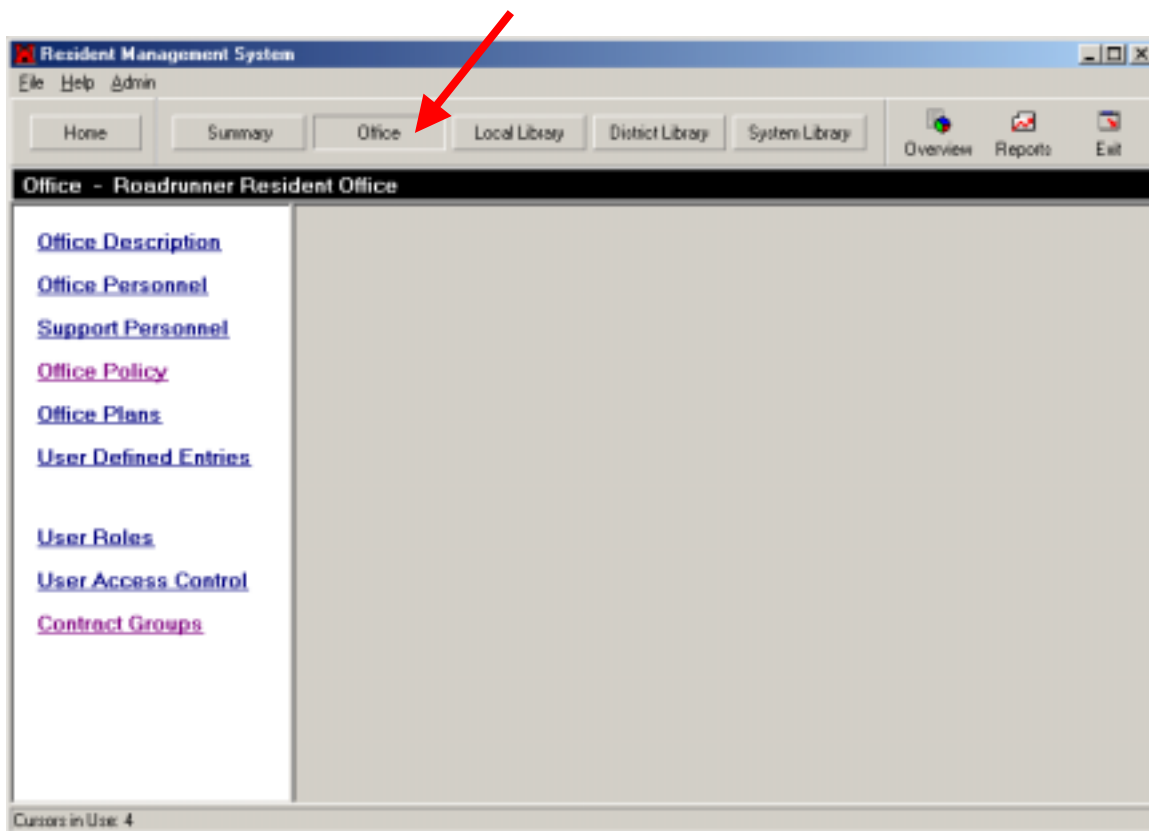
Local Library

The third module, **Local Library**, contains all the libraries maintained by the Local Office. In this option you have the ability to select and either add, edit or delete information contained in the Local Library. This allows you to customize the libraries to fit the requirements of your local operation and management preferences. It is important to ensure that the libraries contain all desired information to cover the myriad of management styles in your field office organization. Changes made in this Library affect all contracts assigned to your office. A good rule to consider is: "*If you didn't put it in the Library, don't remove it!*" Somebody else may have the information there for a reason.

District Library

The fourth module, **District Library**, contains all the libraries maintained by the District Office. Within this option is the ability to select and add, edit or delete information contained in the District Library. This provides uniformity of field offices in areas considered appropriate to be directed or shared from District Staff, policies and procedures. It is important to ensure that the libraries contain all desired information to cover the areas listed. Changes made in the Library affect all contracts within the database that fall under the District Office. As with all the libraries, a recommended rule to follow is: "*If you didn't put it in the Library, don't remove it!*" Somebody else may have the information there for a specific reason.
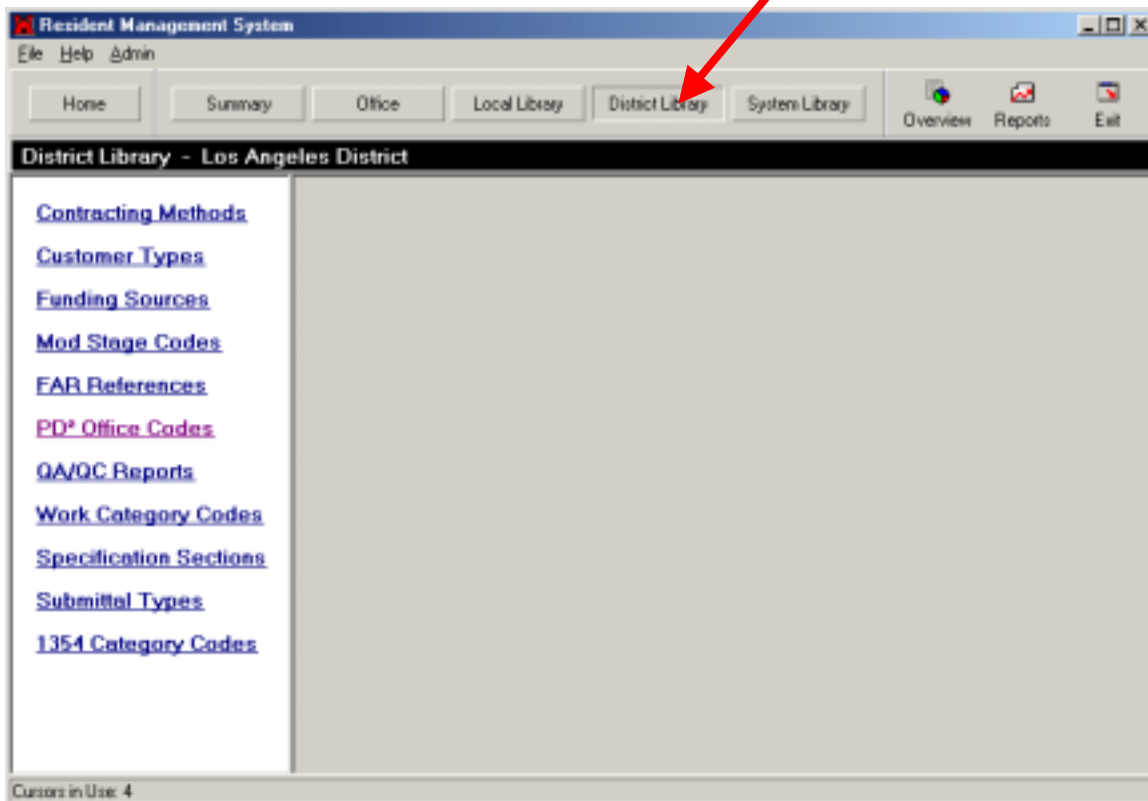

If your contract includes Specification Sections that are not listed in the submittal lookups as you add a Submittal Register for your contract, you will need to contact the person responsible for maintaining the District Library and have them add your new section to the Specification Section portion of the Library. The same procedure would apply to other areas and Libraries of the program that you do not have access to.

System Library

The fifth module, **System Library**, contains all the libraries maintained by the RMS Center. These libraries include HQUSACE policy-driven selections that will seldom change and are considered critical enough that uniformity throughout all USACE Offices is required. Also, there are **Word Document** samples, such as plans and form letters, that you will be able to copy into your Local Library and modify them as desired in your office. These documents will be updated periodically and new, or revised, items will be added as they become available.

The RMS Center also maintains the Master 3-Phase Checks within this library. These checks will also be periodically updated.
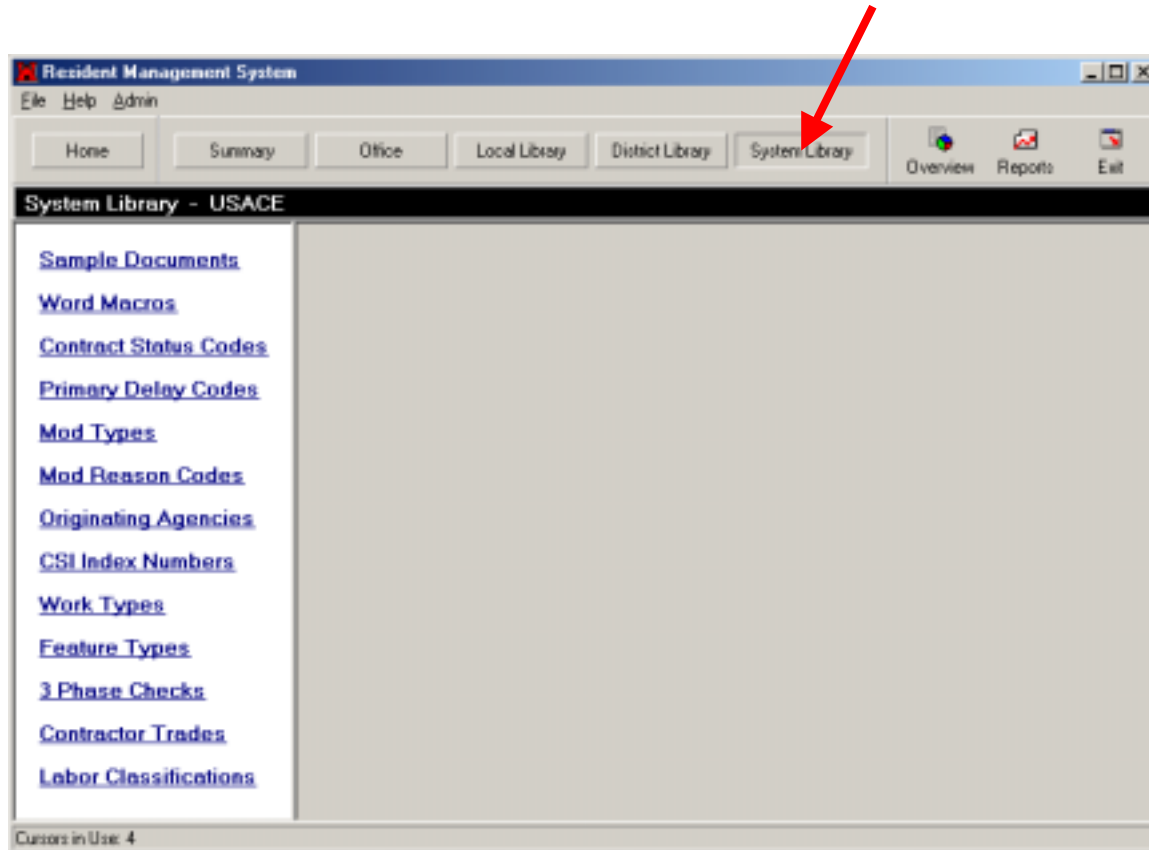

If you or members of your office have form letters, plans, etc., that you would like to see become a part of the System library, please forward them to the RMS Center for consideration. The more examples we have, the easier it will be for all of us.

In addition, if you discover errors within the System Library, please contact the RMS Center so a correction can be made.

Overview

The **Overview** button is still under construction by the RMS Center. It is anticipated that this selection will present a *Management Overview* arena for all the critical areas of the RMS program, spanning all contracts, rolled-up into presentable and meaningful web-based views. The Manager can select the **Overview** and not have to dumpster-dive deep into the program for critical information and status for the individual contracts.
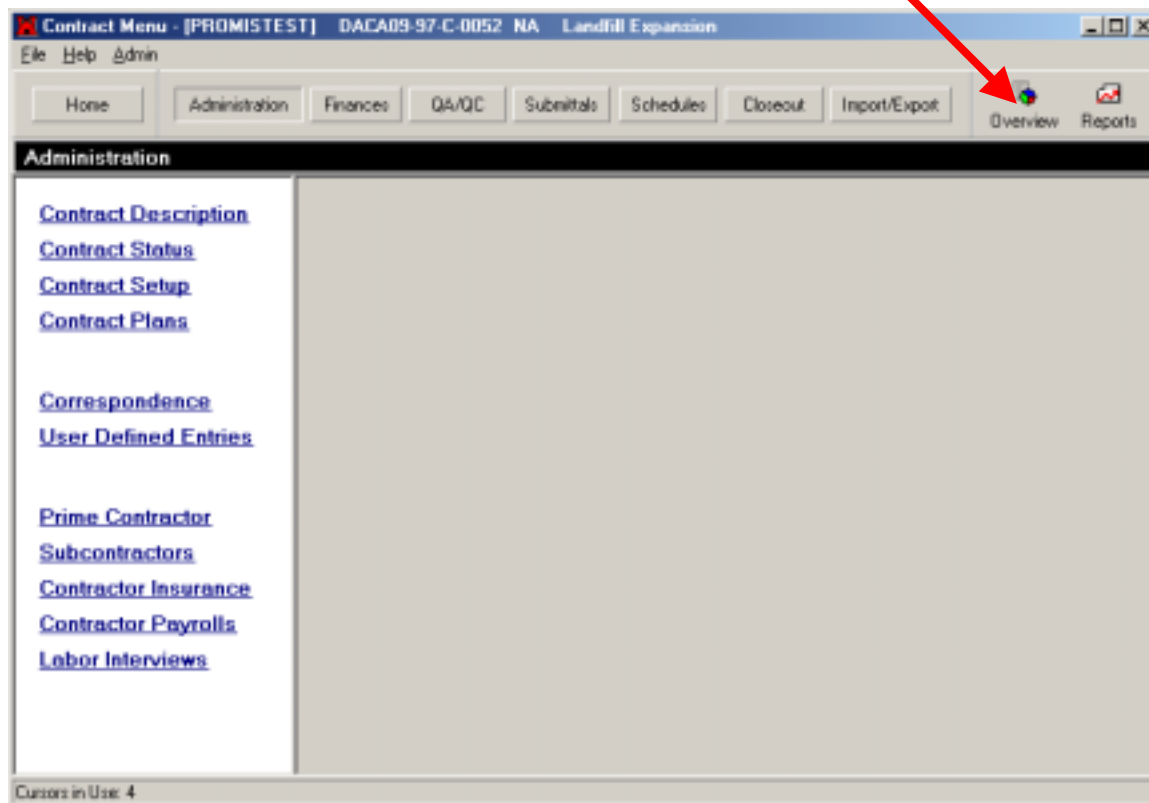
REPORTS

The **Reports** button allows you to enter the **Reports Menu** window and view as well as print any of the reports available throughout the various RMS function areas. The reports are divided in four areas:

- **Contract** – Includes all reports having to do with an individual contract.
- **Summary** – Includes reports spanning several contracts and issues.
- **Office** - Reports pertaining to an office or selection of offices will be here.
- **Library** – Reports from the selected Library will be accessed here.